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HYPERION-THELEN REID BROWN RAYSMAN & STEINER LLP			TRAN, QUOC A	
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Please find below and/or attached an Office communication concerning this application or proceeding.

The time period for reply, if any, is set in the attached communication.

<b>Office Action Summary</b>	<b>Application No.</b>	<b>Applicant(s)</b>	
	10/692,525	TANGEN ET AL.	
	<b>Examiner</b>	<b>Art Unit</b>	
	Tran A. Quoc	2176	

-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address --

### Period for Reply

A SHORTENED STATUTORY PERIOD FOR REPLY IS SET TO EXPIRE 3 MONTH(S) OR THIRTY (30) DAYS, WHICHEVER IS LONGER, FROM THE MAILING DATE OF THIS COMMUNICATION.

- Extensions of time may be available under the provisions of 37 CFR 1.136(a). In no event, however, may a reply be timely filed after SIX (6) MONTHS from the mailing date of this communication.
- If NO period for reply is specified above, the maximum statutory period will apply and will expire SIX (6) MONTHS from the mailing date of this communication.
- Failure to reply within the set or extended period for reply will, by statute, cause the application to become ABANDONED (35 U.S.C. § 133). Any reply received by the Office later than three months after the mailing date of this communication, even if timely filed, may reduce any earned patent term adjustment. See 37 CFR 1.704(b).

### Status

- 1) Responsive to communication(s) filed on 18 December 2007.  
 2a) This action is FINAL.                    2b) This action is non-final.  
 3) Since this application is in condition for allowance except for formal matters, prosecution as to the merits is closed in accordance with the practice under *Ex parte Quayle*, 1935 C.D. 11, 453 O.G. 213.

### Disposition of Claims

- 4) Claim(s) 1,3-18,20-23 and 25-42 is/are pending in the application.  
 4a) Of the above claim(s) \_\_\_\_\_ is/are withdrawn from consideration.  
 5) Claim(s) \_\_\_\_\_ is/are allowed.  
 6) Claim(s) 1,3-18,20-23 and 25-42 is/are rejected.  
 7) Claim(s) \_\_\_\_\_ is/are objected to.  
 8) Claim(s) \_\_\_\_\_ are subject to restriction and/or election requirement.

### Application Papers

- 9) The specification is objected to by the Examiner.  
 10) The drawing(s) filed on 18 December 2007 is/are: a) accepted or b) objected to by the Examiner.  
 Applicant may not request that any objection to the drawing(s) be held in abeyance. See 37 CFR 1.85(a).  
 Replacement drawing sheet(s) including the correction is required if the drawing(s) is objected to. See 37 CFR 1.121(d).  
 11) The oath or declaration is objected to by the Examiner. Note the attached Office Action or form PTO-152.

### Priority under 35 U.S.C. § 119

- 12) Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).  
 a) All    b) Some \* c) None of:  
 1. Certified copies of the priority documents have been received.  
 2. Certified copies of the priority documents have been received in Application No. \_\_\_\_\_.  
 3. Copies of the certified copies of the priority documents have been received in this National Stage application from the International Bureau (PCT Rule 17.2(a)).

\* See the attached detailed Office action for a list of the certified copies not received.

### Attachment(s)

- |  |   |
|--|---|
| 1) <input checked="" type="checkbox"/> Notice of References Cited (PTO-892)                                | 4) <input type="checkbox"/> Interview Summary (PTO-413)           |
| 2) <input type="checkbox"/> Notice of Draftsperson's Patent Drawing Review (PTO-948)                       | Paper No(s)/Mail Date. _____                                      |
| 3) <input type="checkbox"/> Information Disclosure Statement(s) (PTO/SB/08)<br>Paper No(s)/Mail Date _____ | 5) <input type="checkbox"/> Notice of Informal Patent Application |
|  | 6) <input type="checkbox"/> Other: _____                          |

## **DETAILED ACTION**

This is a **Non-Final** rejection in response to RCE/amendments/remarks filed on 12/18/2007. Claims 1, 3-18, 20-23, and 25-42 are pending. Claims 1, 18, and 23 are independence claims. Applicants have amended claims 1, 13, 18, 23, and added new claims 40-42. Effective filing date is 10/24/2003 (Hyperion Solutions Corporation).

### ***Continued Examination under 37 CFR 1.114***

A request for continued examination under 37 CFR 1.114, including the fee set forth in 37 CFR 1.17(e), was filed in this application after final rejection. Since this application is eligible for continued examination under 37 CFR 1.114, and the fee set forth in 37 CFR 1.17(e) has been timely paid, the finality of the previous Office action has been withdrawn pursuant to 37 CFR 1.114.

Applicant's submission filed on 12/18/2007 has been entered.

### ***Claims Rejections – 35 U.S.C. 101***

35 U.S.C. 101 reads as follows:

***Whoever invents or discovers any new and useful process, machine, manufacture, or composition of matter, or any new and useful improvement thereof, may obtain a patent therefor, subject to the conditions and requirements of this title.***

Claims 18, 20-23, 25-39, and 41-42 are rejected under 35 U.S.C. 101, because the claimed invention is directed to non-statutory subject matter.

*Claims 18, 20-23, 25-39, and 41-42:*

Claims 18, and 23 recites an “apparatus” comprising the “means for” for performing various functions (i.e. reading, determining...). The disclosure of the present invention expressly states “**an apparatus for establishing a mapping between internal metadata and external data in a report design environment ...**” (emphasis added -- see Specification → Page 15, Para 28). Also “**adding an additional software package to generate such mappings**” (emphasis added -- see Specification → Page 3, Para 3). Thus, for purposes of examination, the examiner interprets the recited “means for” for performing various functions (i.e. reading, determining...) to comprise only computer software. Accordingly, the “apparatus” recited in Claims 18, and 23 are software *per se*.

Computer software is not a process, a machine, a manufacture or a composition of matter. Accordingly, Claim 17 fails to recite statutory subject matter, as defined in 35 U.S.C. 101.

Claims 20-22, 25-39, and 41-42 merely further describe the recited “means for” for performing various functions (i.e. reading, determining...)” Accordingly, Claims 20-22, 25-39, and 41-42 fail to recite statutory subject matter, as defined in 35 U.S.C. 101.

In the interest of compact prosecution, the application is further examined against the prior art, as stated below, upon the assumption that the applicants may overcome the above stated rejections under 35 U.S.C. 101.

***Claim Rejections - 35 USC § 103***

The following is a quotation of 35 U.S.C. 103(a) which forms the basis for all obviousness rejections set forth in this Office action:

***(a) A patent may not be obtained though the invention is not identically disclosed or described as set forth in section 102 of this title, if the differences between the subject matter sought to be patented and the prior art are such that the subject matter as a whole would have been obvious at the time the invention was made to a person having ordinary skill in the art to which said subject matter pertains. Patentability shall not be negatived by the manner in which the invention was made.***

**Claims 1, 3-18, 20-23, and 25-42** rejected under 35 U.S.C. 103(a) as being unpatentable over Davis et al (U.S. Pub No. 2003/0041077, filed 01/23/2002) [hereinafter “Davis”], in view of Davis et al (U.S. Patent No. 6,920,608, filed 05/18/2000) [hereinafter “Davis'608”],

Regarding ***independent claim 1***, Davis teaches:

**A method for establishing a mapping between internal metadata and external metadata,**

(See Davis at Para 27, discloses the mapper for generating a relationship between data from one or more sources and the one or more values to be placed within the report.

Also see Davis at Para 59, discloses RDL system 106, which provides the analytical processing capability of the system. RDX program elements 102 convert XBRL information into RDL data objects for analysis by RDL system 106. Conduit 104 is a mechanism whereby RDL data objects are passed to the RDL

system 106. Conduit 104 may include any communications mechanism (e.g., an internal memory copy, a TCP/IP transfer across the Internet, or a fetch from a storage device such as a hard disk).

Also see Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets, cash flow reports. XML is also known as metadata. This interpretation is supported by the Applicant's Specification, which states. "XBRL is based on the Extensible Markup Language (XML), and is specifically designed for allow for improved identification and communication of the complex financial information common in corporate business reports. With the rise of XBRL, it would be valuable to allow users to map internal metadata to XBRL external metadata." See Applicant's Specs at Page 3 Para 4)

**the method comprising: reading, from a database, said internal metadata; wherein said internal metadata is metadata that describes data, contained in the database;**

(See Davis at Para 59, the conduit 104 may include any communications mechanism (e.g., an internal memory copy, or a fetch from a storage device such as a hard disk).

Also see Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets, cash flow reports. XML is also known as metadata. This interpretation is supported by the Applicant's Specification, which states. "XBRL is based on the Extensible Markup Language (XML), and is specifically designed for allow for improved identification and

communication of the complex financial information common in corporate business reports. With the rise of XBRL, it would be valuable to allow users to map internal metadata to XBRL external metadata." See Applicant's Specs at Page 3 Para 4)

**generating and displaying a screen, wherein displaying the screen includes displaying organizing the internal metadata, which was read from the database, in a grid having rows and columns,**

(See Davis at Para 67, discloses the RDL system, in turn, provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets, etc;

Also see Davis at Para 59, discloses RDL system 106, which provides the analytical processing capability of the system. RDX program elements 102 convert XBRL information into RDL data objects for analysis by RDL system 106. Conduit 104 is a mechanism whereby RDL data objects are passed to the RDL system 106. Conduit 104 may include any communications mechanism (e.g., an internal memory copy, a TCP/IP transfer across the Internet, or a fetch from a storage device such as a hard disk).

Also see Davis at Para 98, discloses XML document, a RDX style sheet editor (not shown) acts as a report-writer: the user can graphically compose a report from a sample document, specify the XBRL instance documents that the report can apply and automatically create a style document.)

**receiving from said user said definition of external metadata, wherein said definition of external metadata describes describing all**

**data points within said selection; and creating a mapping between  
said selected internal metadata and said defined external metadata**

(See Davis at Para 89-90, discloses RDX system supplements the DTD validation with optional semantic validation based on user-defined rules. For example, a user may define a rule that validates totals with related subtotals to assure the subtotals equal the total. If, however, the XBRL rules are satisfied and there are user-defined rules, RDX parser 204 interprets the XBRL document, by applying the user-defined rules, and then builds the NDOM.

Also See Davis at Para 27, discloses the mapper for generating a relationship between data from one or more sources and the one or more values to be placed within the report.

Also see Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets, cash flow reports. XML is also known as metadata. This interpretation is supported by the Applicant's Specification, which states. "XBRL is based on the Extensible Markup Language (XML), and is specifically designed for allow for improved identification and communication of the complex financial information common in corporate business reports. With the rise of XBRL, it would be valuable to allow users to map internal metadata to XBRL external metadata." See Applicant's Specs at Page 3 Para 4).

**presenting to the user one or more user interface controls for  
receiving, from said user,**

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906.)

In addition Davis does not expressly teach, but Davis'608 teaches:

**wherein dimensional metadata from said internal metadata is placed in the grid as row headings and/or column headings;**

(See Davis'608 at Col. 9, Lines 5-55, discloses "line items that is similar to a "record" or "row" in a relational database. In RDML, the line item is generally the basic unit of calculation, as opposed to a single data value or cell as is typical with most conventional databases or spreadsheets in relational databases, and documentation ("metadata") regarding the "line item sets." wherein the RDML(i.e. RDL) data document 102 is read by the RDML data viewer 100 which stores the data internally, making it available to a number of "views" 108, which present the data in different ways (charts, tables, etc.) to a user).

**receiving from a user a selection of a portion of said grid, said selection indicating one or more cells of the grid;**

(See Davis'608 at Col. 8, Lines 10-20, discloses internal data viewer architecture, which includes spreadsheet view and a graphical user interface.)

**in response to said selection, determining which internal metadata, displayed on said grid, corresponds to said one or more cells; wherein the internal metadata that corresponds to the one or more cells is a subset of all internal metadata displayed in said grid;**

(See Davis'608 at Col. 8, Lines 10-20, discloses internal data viewer architecture, which includes spreadsheet view and a graphical user interface.)

**a definition of external metadata for only said subset of internal metadata that corresponds to cells that were selected by said selection;**

(See Davis'608 at Col. 15, Lines 50-65, discloses metadata to the RDML Data Viewer 100. It can be stored locally, or can be transmitted over network 214 such as a corporate LAN or the Internet (using HTTP, FTP, email, etc.). To be a valid RDML document 102, the file conforms to the RDML Document Type Definition ("DTD").

Also See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906. )

It would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include an internal data viewer architecture, which includes spreadsheet view and a graphical user interface as taught by Davis'608. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report;

that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding independent claim 18,*

is directed an apparatus to perform the method of claim 1 which cites above, and are similarly rejected under the same rationale -See Davis at Para 68, discloses various System Hardware Components.

In addition Davis teaches:

**present to the user one or more user interface controls for receiving, from said user,**

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906.

In addition Davis does not expressly teach, but Davis'608 teaches:

**a definition of external metadata for only said subset of internal metadata that corresponds to cells that were selected by said selection;**

(See Davis'608 at Col. 15, Lines 50-65, discloses metadata to the RDML Data Viewer 100. It can be stored locally, or can be transmitted over network 214 such as a corporate LAN or the Internet (using HTTP, FTP, email, etc.). To be a valid RDML document 102, the file conforms to the RDML Document Type Definition ("DTD").

Also See Davis'608 at Col. 8, Lines 10-20, discloses spreadsheet view and a graphical user interface.)

It would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include an internal data viewer architecture, which includes spreadsheet view and a graphical user interface as taught by Davis'608. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding independent claim 23,*

is directed an apparatus to perform the method of claim 1 which cites above, and are similarly rejected under the same rationale-See Davis at Para 68, discloses various System Hardware Components.

*Regarding claims 3 and 25, Davis' 608 teaches:*

**determining if the external metadata describing all data points within said selection is predefined; and wherein if the external metadata describing all data points within said selection is predefined,**

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906. )

In addition Davis does not expressly teach, but Davis'608 teaches:

**said receiving from said user a definition of external metadata comprises: presenting said user a list from which they may select an item of predefined metadata; and receiving from said user a selection of an item of predefined metadata from said list.**

(See Davis'608 at Col. 8, Lines 10-20, discloses spreadsheet view and a graphical user interface.

Also see Davis'608 at Col. 45, Line 19-20, discloses when a user right-clicks on a selected series, a pop-up menu 1424 is displayed showing the different types of documentation available.)

It would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include a means of receiving from said user a definition of external metadata comprises: presenting said user a list from which they may select an item of predefined metadata; and receiving from said user a selection of an item of predefined metadata from said list as taught by Davis'608.

One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a

current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding claims 4 and 26*, Davis teaches:

**wherein said list is provided in a tree control.**

(See Davis at Para 62, discloses a s NDOMs form a tree structure corresponding

*Regarding claim 5 and 27*, Davis teaches:

**determining if syntax of the external metadata describing all data points within said selection is predefined;**

(See Davis at Para 40, discloses a diagram illustrating interaction between the RDX document editor, RDX mapper, and the document templates;

**and wherein if the external metadata describing all data points within said selection is not predefined, but syntax of the external metadata describing all data points within said selection is predefined,**

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906. )

**said receiving from said user a definition of external metadata comprises: presenting said user with one or more dialog boxes in**

**which they can specify external metadata to be created; and receiving from said user a specification of external metadata to be created.**

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906. )

*Regarding claims 6-7 and 28-29,*

the rejection of claim 1 is fully incorporated.

In addition, Davis teaches:

**wherein said presenting includes presenting said user with a dialog box.**

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906. )

*Regarding claims 8 and 30,*

the rejection of claim 1 is fully incorporated.

In addition, Davis teaches:

**wherein said presenting includes presenting said user with a dialog box.**

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906. )

*Regarding claims 9 and 31,*

the rejection of claim 1 is fully incorporated. In addition, Davis teaches:

**wherein said presenting includes presenting said user with a dialog box.**

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906. )

*Regarding claims 10 and 32,*

the rejection of claims 1 and 4 are fully incorporated.

In addition, Davis teaches:

**an element button is selected and a text field when a custom button is selected.**

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906.

*Regarding claims 11 and 33,*

Davis does not expressly teach, but Davis'608 teaches:

**wherein said selection is one or more columns in said grid.**

(See Davis'608 at Col. 8, Lines 10-20, discloses internal data viewer architecture, which includes spreadsheet view and a graphical user interface.)

It would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include a means of receiving from said user a selection of is one or more columns in said grid as taught by Davis'608. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding claims 12 and 34, Davis teaches:*

Davis does not expressly teach, but Davis'608 teaches:

**wherein said selection is one or more columns in said grid.**

(See Davis'608 at Col. 8, Lines 10-20, discloses internal data viewer architecture, which includes spreadsheet view and a graphical user interface.)

It would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include a means of receiving from said user a selection of is one or more columns in said grid as taught by Davis'608. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding claims 13 and 35, Davis'608 teaches:*

**selecting individual cells in said grid.**

(See Davis'608 at Col. 8, Lines 10-20, discloses internal data viewer architecture, which includes spreadsheet view and a graphical user interface.)

It would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include a means of receiving from said user a selection of is one or more columns in said grid as taught by Davis'608. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and

automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding claims 14 and 36,*

Davis does not expressly teach, but Davis'608 teaches:

**receiving from said user a formula involving one or more data items in said grid; creating a new row or column in said grid; entering said formula into a cell in said new row or column; and wherein said selection includes said cell.**

(See Davis'608 at Col. 8, Lines 10-20, discloses internal data viewer architecture, which includes spreadsheet view and a graphical user interface.)

It would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include a means of receiving from said user a selection of one or more columns in said grid as taught by Davis'608. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding claims 15 and 37,*

Davis does not expressly teach, but Davis'608 teaches:

**receiving from said user a formula involving one or more data items in said grid; creating a new row or column in said grid; entering said formula into a cell in said new row or column; and wherein said selection includes said cell.**

(See Davis'608 at Col. 8, Lines 10-20, discloses internal data viewer architecture, which includes spreadsheet view and a graphical user interface.)

It would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include a means of receiving from said user a selection of one or more columns in said grid as taught by Davis'608. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding claims 16 and 38,* Davis teaches:

**external metadata is Extensible Business Reporting Language (XBRL) metadata ;**

(See Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets report.)

*Regarding claims 17 and 39,*

the rejection of claim 1 is fully incorporated.

In addition, Davis teaches: **schema manager**- See Davis at Para 82, discloses XBRL Schema management.

*Regarding Claim 20, Davis teaches:*

**a predefined external metadata selection determiner coupled to said external metadata user definition receiver;**

(See Davis at Para 27, discloses the mapper for generating a relationship between data from one or more sources and the one or more values to be placed within the report.

Also see Davis at Para 59, discloses RDL system 106, which provides the analytical processing capability of the system. RDX program elements 102 convert XBRL information into RDL data objects for analysis by RDL system 106. Conduit 104 is a mechanism whereby RDL data objects are passed to the RDL system 106. Conduit 104 may include any communications mechanism (e.g., an internal memory copy, a TCP/IP transfer across the Internet, or a fetch from a storage device such as a hard disk).

Also see Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets, cash flow reports. XML is

also known as metadata. This interpretation is supported by the Applicant's Specification, which states. "XBRL is based on the Extensible Markup Language (XML), and is specifically designed for allow for improved identification and communication of the complex financial information common in corporate business reports. With the rise of XBRL, it would be valuable to allow users to map internal metadata to XBRL external metadata." See Applicant's Specs at Page 3 Para 4)

**and wherein said external metadata user definition receiver includes: a predefine metadata list presenter; and a predefined metadata list item receiver coupled to said predefined metadata list presenter.**

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906. )

Also See Davis at Para 27, discloses the mapper for generating a relationship between data from one or more sources and the one or more values to be placed within the report.

Also see Davis at Para 23; discloses XBRL is an XML-based language used for reporting financials such as balance sheets, cash flow reports. XML is also known as metadata. This interpretation is supported by the Applicant's Specification, which states. "XBRL is based on the Extensible Markup Language (XML), and is specifically designed for allow for improved identification and

communication of the complex financial information common in corporate business reports. With the rise of XBRL, it would be valuable to allow users to map internal metadata to XBRL external metadata." See Applicant's Specs at Page 3 Para 4)

*Regarding Claim 21*, Davis teaches:

**a predefined external metadata syntax determiner coupled to said external metadata user definition receiver; and wherein said metadata dialog box presenter; and an external metadata specification receiver coupled to said external metadata dialog box presenter.**

(See Davis at Para 27, discloses the mapper for generating a relationship between data from one or more sources and the one or more values to be placed within the report.

Also see Davis at Para 59, discloses RDL system 106, which provides the analytical processing capability of the system. RDX program elements 102 convert XBRL information into RDL data objects for analysis by RDL system 106. Conduit 104 is a mechanism whereby RDL data objects are passed to the RDL system 106. Conduit 104 may include any communications mechanism (e.g., an internal memory copy, a TCP/IP transfer across the Internet, or a fetch from a storage device such as a hard disk).

Also see Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets, cash flow reports. XML is

also known as metadata. This interpretation is supported by the Applicant's Specification, which states. "XBRL is based on the Extensible Markup Language (XML), and is specifically designed for allow for improved identification and communication of the complex financial information common in corporate business reports. With the rise of XBRL, it would be valuable to allow users to map internal metadata to XBRL external metadata." See Applicant's Specs at Page 3 Para 4)

Regarding **Claim 22**, Davis teaches:

**a user formula receiver; a new row or column creator coupled to said user formula receiver and to said internal metadata grid organizer; a new row or column user formula placer coupled to said new row or column creator and to said user formula receiver.**

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906.

Also see Davis at Para 110, discloses pointers reference information in a variety of accessible locations (e.g., in files, spreadsheets, other XBRL documents, relational databases, non-relational databases (e.g., object-based databases), accounting software packages, and URL's). Such information can be either local or web-based)

*Regarding Claims 40-42, Davis teaches:*

**the internal metadata describes data, contained in the  
database, from which a report is to be generated;**

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906.

Also see Davis at Para 110, discloses pointers reference information in a variety of accessible locations (e.g., in files, spreadsheets, other XBRL documents, relational databases, non-relational databases (e.g., object-based databases), accounting software packages, and URL's). Such information can be either local or web-based).

In addition Davis does not expressly teach, but Davis'608 teaches:

**and the screen includes tools for designing the report.**

(See Davis'608 at Col. 8, Lines 10-20, discloses internal data viewer architecture, which includes spreadsheet view, and a graphical user interface, and . Also Davis'608 further discloses a graphical tool used by the user to create an RDML document 102, See Davis' 608 at Col. 15, Lines 10-25,)

It would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include the screen includes tools for designing the report as taught by Davis'608. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable

reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

It is noted that any citations to specific, pages, columns, lines, or figures in the prior art references and any interpretation of the references should not be considered to be limiting in any way. A reference is relevant for all it contains and may be relied upon for all that it would have reasonably suggested to one having ordinary skill in the art. See, MPEP 2123.

### ***Response to Arguments***

Applicant's arguments with respect to claims 1, 3-18, 20-23, and 25-42 have been considered but are moot in view of the new ground(s) of rejection.

### ***Conclusion***

Any inquiry concerning this communication or earlier communications from the examiner should be directed to Quoc A. Tran whose telephone number is 571-272-8664. The examiner can normally be reached on 9AM - 5PM EST.

If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Doug Hutton can be reached on 571-272-4137. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a USPTO Customer Service Representative or access to the automated information system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.

/Quoc A, Tran/  
Patent Examiner  
Art Unit 2176  
01/04/2008

*/Doug Hutton/*  
Doug Hutton  
Supervisory Primary Examiner  
Technology Center 2100